

USDA Weekly Retail Turkey Feature Activity

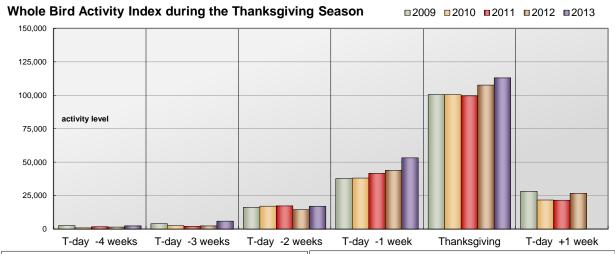
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 11/22 thru 11/28.

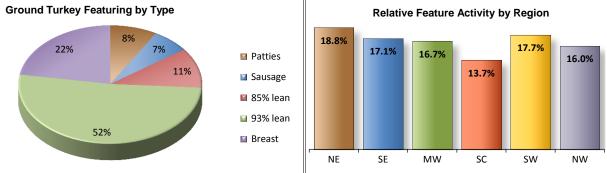
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY									
	THIS	LAST	YEAR						
Feature Rate 1/	94.0% (of 23,200	79.1% (of 23,200	87.0% d	of 22,500			
reature Rate	out	tlets	out	tlets	outlets				
Special Rate 4/	3.	3%	4.	3%	4.	3%			
Activity Index 2/	148	3,980	72	,240	135	,100			
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg			
WHOLE BIRDS:									
Fresh - Hens	22,320	1.57	2,290	1.45	17,380	1.60			
" - Toms	22,380	1.57	2,290	1.45	17,310	1.60			
Frozen - Hens	33,820	0.92	24,110	0.93	36,510	0.95			
" - Toms	34,510	0.91	24,560	0.92	36,470	0.95			
PARTS:									
Breast:									
Bone-in, whole									
Fresh	6,040	2.65	450	2.87	4,210	2.46			
Frozen	16,440	1.82	7,540	1.86	14,710	1.80			
Split, bone-in									
Fresh					30	2.73			
Rotisserie	3,800	8.05	390	8.11	1,320	8.33			
Boneless, whole	50	4.99			30	4.42			
Cutlets	340	4.99	260	4.81	320	4.99			
Cutlets, thin sliced	140	4.99							
Strips			170	4.99					
Tenders	60	3.99	420	4.45	170	4.09			
Marinated Tenders	660	4.26	310	4.83	90	4.79			
Drumsticks	520	1.78	60	1.54	330	1.89			
Thighs	10	2.49	10	2.18	10	2.19			
Wings	480	1.64	20	1.41	360	1.87			
Necks	120	1.88	10	1.29	20	1.57			
Smoked Drumsticks	190	2.53	70	2.43	170	1.98			
Smoked Wings	260	2.18	90	2.20	200	1.89			
Smoked Necks	330	1.99	70	1.98	160	1.93			
GROUND TURKEY:	6,460	3.85	8,660	3.39	5,060	3.28			
Patties	540	3.40	90	3.50	630	3.46			
Sausage	430	3.37	1,840	3.34	740	3.44			
85% lean	710	2.81	3,290	2.69	860	2.71			
93% lean	3,330	3.86	1,370	3.26	2,210	3.17			
Breast	1,450		2,070		620	4.82			
Rolls (frsh/frz 1 lb.)	30	1.76	310	2.23	80	2.33			
Specialty ^{5/}									
Patties	10	3.99							
93-94% lean			150	3.39	160	4.25			
Breast	10	5.99			Ī				

This Week's Turkey Feature Highlights

This is the final week before Thanksgiving and there are turkey promotions galore. Specialty turkeys, cooked turkeys, turkey dinners are all showcased in this week's ads. Retailers are also matching competitors' advertised prices and wrapping up their purchase based promotions. Offerings of fresh hens and toms exceed last year's volume; prices are lower this year. Offerings of frozen whole turkeys are lower compared to a year ago but prices are also lower. More stores are promoting fresh and frozen bone-in breasts this year; prices are higher. No time to cook? Rotisserie breasts are heavily promoted and prices are lower. Shoppers looking for boneless white parts will find marinated tenders offered at lower prices. Offerings increase on fresh and smoked dark parts. Fewer stores are featuring ground turkey compared to last week; over half the ads promote the 93% lean. Deli market activity increases. Promotional activity on service deli items is close to last week's volume; advertised prices are mostly lower. Featuring increases on self-service deli; prices are mixed.





All report information gathered from publicly available sources including store circulars, newspaper ads, and retailer websites.

1/ Feature Rate: the amount of sampled stores advertising <u>any</u> reported turkey item during the current week, expressed as a percentage of the total sample. 2/ Activity Index: a measure of the absolute frequency of feature activity equal to the total number of stores for each advertised turkey item (e.g., a retailer with 100 outlets featuring 3 turkey items has an activity index of 300). 3/ Stores/Avg: the total number of advertising outlets and the weighted average price weighted by the respective number of outlets. 4/ Special Rate: the percentage of sampled stores with a no-price promotion (e.g., buy 1, get 1 free, etc.) 5/ Specialty: products produced from birds raised on an all vegetable diet without antibiotics and minimally processed.



Fri. Nov 22, 2013

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Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 11/22 thru 11/28.

(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

	NORTI	HEAST U.S.		SOUT	HEAST U.S.	MIDWEST U.S.					
	(CT,DE,MA,MD,M	IE,NH,NJ,NY,PA,F	RI,VT)	(AL,FL,GA,M	S,NC,SC,TN,VA,W	′V)	(IA,IL,IN,KY,MI,MN,ND,NE,OH,SD,WI)				
Feature Rate 1/	95.9% of 4.60	0 sampled outle	ts	95.0% of 6.1	00 sampled outle	95.7% of 4,200 sampled outlets					
Special Rate 4/	2.3% of stores w	/ no-price promo	tions	0.4% of stores	w/ no-price promo	tions	5.4% of stores w/ no-price promotions				
Activity Index 2/		ndex = 32,590			Index = 40,560			Index = 26,370			
Activity index	Price Range	Summar	V	Price Range	Summar	V	Price Range	Summa	rv		
	(\$/pound)	Stores Wtd Avg		(\$/pound)		Vtd Avg	(\$/pound)	Stores Wtd Avg			
WHOLE BIRDS:											
Fresh - Hens	0.79 - 2.49	4,720	1.40	0.99 - 1.99	6,180	1.62	0.99 - 2.49	3,620	1.70		
" - Toms	0.79 - 2.49	4,720	1.40	0.99 - 1.99	6,160	1.62	0.99 - 2.49	3,620	1.70		
Frozen - Hens	0.47 - 2.90	6,440	0.86	0.43 - 1.79	9,100	0.88	0.39 - 1.79	7,000	1.00		
" - Toms	0.47 - 2.90	6,650	0.86	0.43 - 1.79	9,060	0.88	0.39 - 1.69	7,220	0.99		
PARTS:											
Breast:											
Bone-in, whole											
Fresh	1.79 - 3.49	1,090	2.84	1.79 - 2.99	2,440	2.34	1.79 - 2.99	680	2.83		
Frozen	0.99 - 3.49	2,800	1.87	0.99 - 2.99	6,600	2.00	0.99 - 2.49	3,230	1.65		
Split, bone-in											
Fresh											
Rotisserie	6.99 - 9.74	870	7.94	6.99 - 8.49	610	8.01	7.99	200	7.99		
Boneless, whole	4.99	50	4.99								
Cutlets	4.99	340	4.99								
Cutlets, thin sliced	4.99	140	4.99								
Strips											
Tenders							3.99	60	3.99		
Marinated Tenders	4.26	520	4.26	4.26	70	4.26	0.00		0.00		
Drumsticks	1.49 - 1.88	300	1.81	1.49	10	1.49	1.39 - 1.79	60	1.53		
Thighs	1.40 1.00	000	1.01	1.40	10	1.40	1.00 1.70		1.00		
Wings	1.39 - 1.88	300	1.57	1.29	10	1.29	1.39 - 1.79	30	1.59		
Necks	1.59 - 1.00	300	1.57	1.23	10	1.29	1.39 - 1.79	20	1.56		
Smoked Drumsticks	1.99 - 2.69	170	2.59				1.99	10	1.99		
Smoked Wings	1.99 - 2.49	240	2.39	1.69	10	1.69	1.99	10	1.99		
Smoked Necks	1.98 - 2.49	320	2.00	1.69	10	1.69	1.99	10	1.99		
GROUND TURKEY:	1.90 - 2.49	320	2.00	1.09	10	1.09					
Patties	2.99 - 4.99	520	3.40	3.50	20	3.50					
	2.99 - 4.99 2.63 - 3.99	350	3.40	3.50	20	3.50 3.19	3.27	20	3.27		
Sausage 85% lean	2.63 - 3.99 2.33 - 3.90	470	3.25 2.86	2.66 - 2.91	60	3.19 2.74	3.21	20	3.21		
			2.86 3.59	2.66 - 2.91 3.79 - 4.00			2.91 - 4.00	400	3.55		
93% lean	3.19 - 4.99	470			120	3.87		400			
Breast (99-100% lean)	4.22 - 5.38	1,100	4.76	4.61	80	4.61	4.16	170	4.16		
Rolls (frsh/frz 1 lb.)							1.69	10	1.69		
Specialty ^{5/}	0.00	40	0.00								
Patties	3.99	10	3.99								
93-94% lean							F 00	10	F 00		
Breast				No (545) 204 4474			5.99	10	5.99		



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Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 11/22 thru 11/28.

(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

	SOUTH	CENTRAL U.S.		SOUT	THWEST U.S.	NORTHWEST U.S.					
	(AR,AZ,CO,KS,	LA,MO,NM,OK,TX	(,UT)	(CA,HI,NV)		(AK,ID,MT,OR,WA,WY)				
Feature Rate ^{1/} Special Rate ^{4/}	•	00 sampled outle			900 sampled outle w/ no-price promo	84.0% of 1,200 sampled outlets 10.1% of stores w/ no-price promotions					
Activity Index 2/	Activity	Index = 21,690			/ Index = 20,220		Activity	Index = 7,550			
·	Price Range	Summar	у	Price Range	Summar	у	Price Range	Summa	ıry		
	(\$/pound)	Stores V	Vtd Avg	(\$/pound)	Stores V	Vtd Avg	(\$/pound)	Stores	Wtd Avg		
WHOLE BIRDS:											
Fresh - Hens	0.99 - 1.48	2,660	1.54	0.90 - 1.99	3,780	1.55	0.99 - 1.99	1,360	1.67		
" - Toms	0.99 - 1.48	2,620	1.54	0.99 - 1.99	3,900	1.57	0.99 - 1.99	1,360	1.67		
Frozen - Hens	0.35 - 0.49	5,980	0.98	0.49 - 1.89	3,910	0.82	0.57 - 2.19	1,390	1.05		
" - Toms	0.35 - 0.50	5,950	0.98	0.49 - 1.89	4,240	0.78	0.57 - 2.19	1,390	1.05		
PARTS:					, -			,			
Breast:											
Bone-in, whole											
Fresh	2.19 - 2.99	610	2.83	2.49 - 2.99	850	2.86	2.49 - 3.29	370	2.98		
Frozen	0.99 - 1.48	2,390	1.61	0.99 - 1.99	1,010	1.64	0.99 - 1.99	410	1.62		
Split, bone-in											
Fresh											
Rotisserie	6.99 - 7.99	710	8.09	7.99 - 8.99	860	8.00	6.99 - 8.99	550	8.31		
Boneless, whole											
Cutlets											
Cutlets, thin sliced											
Strips											
Tenders											
Marinated Tenders	4.26	70	4.26								
Drumsticks	1.69 - 2.49	100	2.02	1.49	40	1.49	1.49	10	1.49		
Thighs	2.49	10	2.49								
Wings	1.99	90	1.99	1.49	40	1.49	1.49	10	1.49		
Necks	1.99	90	1.99				1.49	10	1.49		
Smoked Drumsticks	1.99	10	1.99								
Smoked Wings											
Smoked Necks											
GROUND TURKEY:											
Patties											
Sausage				3.60 - 4.99	40	4.49					
85% lean	2.99	10	2.99	2.66	170	2.66					
93% lean	3.19 - 4.00	300	3.83	3.51 - 4.00	1,380	3.99	3.19 - 4.00	660	3.97		
Breast (99-100% lean)	4.16 - 4.39	70	4.26				4.39 - 5.99	30	4.86		
Rolls (frsh/frz 1 lb.)	1.79	20	1.79								
Specialty ^{5/}											
Patties											
93-94% lean											
Breast											



USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Fri. Nov 22, 2013

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 11/22 thru 11/28.

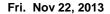
(prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

	N	ATIONAL	SUMMAR	Y			NORTHEAST U.S.			SOUTHEAST U.S.							
	This	Week	Last	Week	Last	Year	(CT,DE,MA,MD,ME,NH,NJ,NY,PA,RI,VT)				(AL,FL,GA,MS,NC,SC,TN,VA,WV)						
Facture Bate 1/	75.0% o	f 23,200	65.4% o	f 23,200	55.6% o	f 22,500											
Feature Rate 1/	sto	res	sto	res	sto	res		88.6% of 4,600 sampled outlets				79.0% of 6,100 sampled outlets					
Activity Index 2/	12	890	37,0	050	25	360		Activity Index = 12,010				Activity Index = 14,520					
Activity index 21	43,	090	37,	030	33,	300	Price Range		Summary		Price Range		Sum	mary			
	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg	(:	\$/pou	nd)	Stores	Wtd Avg	(\$/pound)		Stores	Wtd Avg		
SERVICE DELI - Turkey																	
Category 1																	
Processor Brand	6,030	7.81	4,460	7.99	,	7.92		77 -		1,960	8.15		- 8.99	2,840	7.79		
Private Brand	2,230	7.49	2,500	7.62	2,940	7.63	6.4	17 -	7.99	1,400	7.23	7.49	- 7.99	470	7.91		
Category 2																	
Processor Brand	3,230	5.66	4,280	5.85	4,000	6.08	4.4	18 -		1,130	5.76		- 5.99	490	5.35		
Private Brand	5,620	5.76	3,320	6.60	2,300	5.85			6.99	1,290	6.99	4.49	- 6.99	2,850	4.93		
Category 3																	
Processor Brand	610	4.01	1,200	4.17	590	3.78			4.99	410	4.16	2.99	- 3.99	70	3.25		
Private Brand	80	4.47	60	4.41	70	4.70	3.7	77 -	4.98	60	4.63						
Turkey Ham	0.40	0.00	000	0.00	050	4.40			4.00	000	4.04	0.40	4.40	50	4.40		
Processor Brand	340	3.80	290	3.60	350	4.12	3.4	18 -	4.99	200	4.01	3.49	- 4.49	50	4.16		
Private Brand																	
Turkey Pastrami	400	4.45	400	4.07	400	0.00			0.00	470	0.00						
Processor Brand	190	4.15	100	4.37	430	3.60			3.99	170	3.99						
Private Brand																	
SERVICE DELI - Chicken																	
Category 1																	
Processor Brand	1,920	7.51	3,350	7.52	3,330	7.77		77 -		970	8.00		5.99	20	5.99		
Private Brand	1,660	7.62	2,090	7.14	1,060	7.28	6.9	99 -	7.99	1,550	7.65		6.99	70	6.99		
Category 2																	
Processor Brand	80	5.04	310	4.96	20	4.97											
Private Brand	160	5.99	210	5.99	1,720	5.11											
SELF-SERVICE DELI																	
(dollars per tub or pouch)																	
Turkey 7-10 oz	0.400	0.07	F 000	0.05	4.000	2.00	0.0	٠.	2.00	000	0.74	0.75	2.00	2.460	2.00		
Processor Brand	9,490 720	2.97 2.91	5,360	2.85 2.80	4,960	3.26 2.88		00 - 50 -		860 480	2.74 2.90	_	- 3.99 - 2.50	3,160 50	3.09 2.50		
Private Brand Turkey 16 oz	120	2.91	1,550	2.60	1,210	2.08	2.5	.U -	3.00	460	2.90	2.49	- 2.50	50	2.50		
Processor Brand	1,560	5.17	1,140	5.07	1,930	4.96	1 /	19 -	5 00	320	5.23	4 00	- 5.99	1,240	5.15		
Private Brand	1,500	5.17	1,140	4.71	40	4.49	4.4	- E	J.33	320	0.20	4.99	- 3.33	1,240	5.15		
Chicken 7-10 oz			110	4.71	40	4.49											
Processor Brand	9,310	2.95	5,280	2.84	4,740	3.28	20	00 -	3.99	790	2.77	2 75	- 3.99	3,160	3.09		
Private Brand	660	2.94	1,440	2.79	,	2.86		50 -		420	2.77	_	- 2.50	50	2.50		
i iivate bianu	000	2.34	1,770	2.73	1,070	2.00	2.0	· · ·	0.00	720	2.00	2.43	2.00	50	2.00		

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)





USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 11/22 thru 11/28.

(prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

	MIDW	S	SOUTH CENTRAL U.S.				THWEST U.	S.	NORTHWEST U.S.				
	(IA,IL,IN,KY,MI,MI	N,ND,NE,OH,SD,	VI) (AR,AZ	,CO,KS,L/	A,MO,NM,OI	K,TX,UT)	(1	CA,HI,NV)		(AK,ID,MT	,OR,WA,WY)	
Feature Rate 1/	70.00/ -5.4.000	\	CC 41	20.10/ (1.000				200	Lautlata				
	78.8% of 4,200		66.4% of 4,200 sampled outlets Activity Index = 5,800				900 sampled		78.2% of 1,200 sampled outlets Activity Index = 2,280				
Activity Index 2/	Price Range	ndex = 7,890 Summary		Range	Summ		Price Range	y Index = 1,3	mmary	Price Range			
	(\$/pound) Stores Wtd Avg			ound)	Stores V	•	(\$/pound)		Wtd Avg	_		Summary Stores Wtd Avg	
SERVICE DELI - Turkey	(4/200110)	Giolos Illan	9 (4,75	, u. i.u.)	0.0.00	rtaring	(φ/ροαιία)	0.0.00		(\$\psi \sin \sin \sin \sin \sin \sin \sin \s	0.0.00		
Category 1													
Processor Brand	6.49 - 8.99	750 7.1	1 6.99	- 8.49	310	7.82	7.99	80	6.66	6.99 - 12.99	90	8.04	
Private Brand	6.99 - 10.99	310 7.9		7.99	50	7.99							
Category 2													
Processor Brand	4.66 - 6.99	560 5.7	6 4.99	- 5.99	660	5.47	4.99 - 5.99	200	5.85	5.99	190	5.99	
Private Brand	4.98 - 6.99	760 6.2	8 5.99	- 6.99	220	6.45				5.99 - 7.99	500	6.26	
Category 3													
Processor Brand	3.98 - 4.79	70 4.2	5 2.99	- 3.89	60	3.62							
Private Brand	3.98	20 3.9	8										
Turkey Ham													
Processor Brand				3.19	10	3.19	2.69 - 3.49	80	3.11				
Private Brand													
Turkey Pastrami													
Processor Brand	7.95	10 7.9	5							2.99	10	2.99	
Private Brand													
SERVICE DELI - Chicken													
Category 1													
Processor Brand	5.95 - 8.99	620 6.7	8 5.99	- 8.99	190	7.26	7.99	10	7.99	7.99	110	7.99	
Private Brand	6.99	10 6.9	9	7.99	30	7.99							
Category 2													
Processor Brand	4.79 - 5.58	80 5.0											
Private Brand	5.99	160 5.9	9										
SELF-SERVICE DELI													
(dollars per tub or pouch)													
Turkey 7-10 oz													
Processor Brand	1.99 - 3.59	2,280 2.9		- 2.50	2,160	2.92	2.75 - 3.00	340		2.75 - 3.79	690	3.17	
Private Brand	2.79 - 3.69	20 3.3	9				2.99	170	2.99				
Turkey 16 oz													
Processor Brand Private Brand													
Chicken 7-10 oz													
Processor Brand	0.30 - 3.59	2,220 2.7	0 1 00	- 2.50	2,110	2.92	2.75 - 3.00	340	2.80	2.75 - 3.79	690	3.17	
Private Brand	2.79 - 3.69	2,220 2.7		2.50	۷,۱۱۰	۷.۵۷	2.75 - 3.00	170		2.13 - 3.18	090	J. 17	
1 Hvate Blattu	2.13 - 3.03	20 3.0	J				2.99	170	2.33		1		

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)